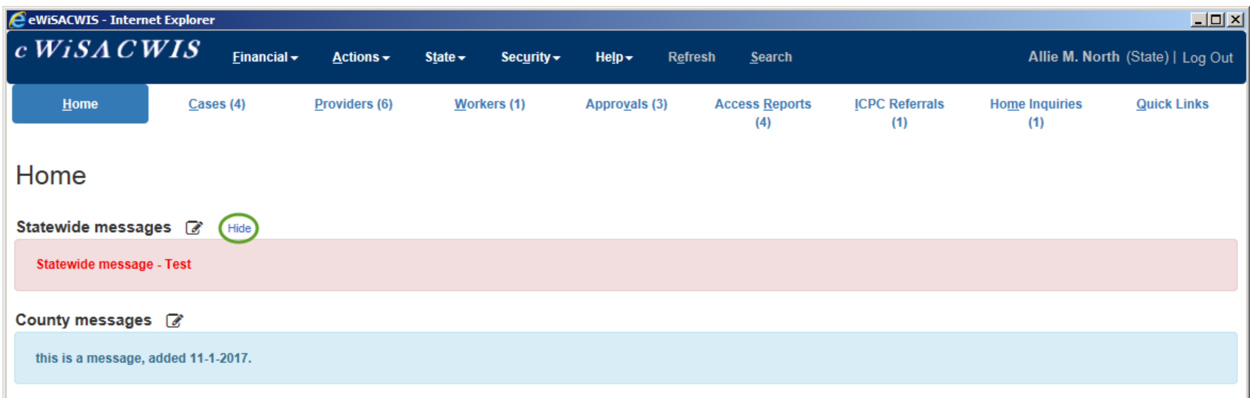
Desktop

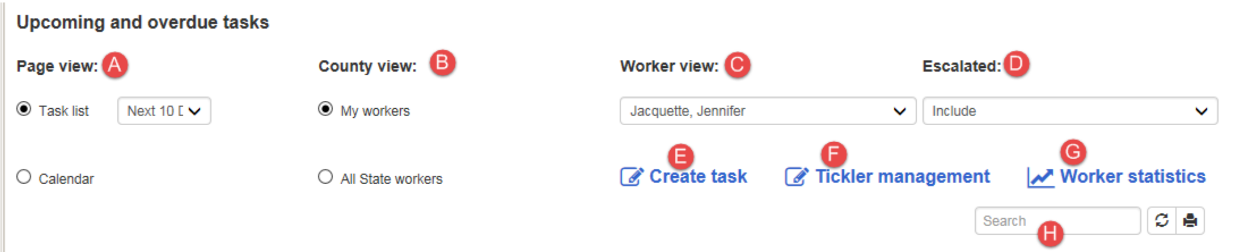
The eWiSACWIS desktop displays the cases, providers and associated pieces of work that are assigned to that specific user. There are several menus and tabs which help organize the work into digestible sizes. Tabs and menus only display information that the user has the eWiSACWIS security for.

Home Tab

The Home Tab tab is the first tab of the eWiSACWIS desktop. The first section of the Home tab has State and County Messages. The State messages are set by State staff and are not editable. The County messages are set by County staff that have the security to add such messages. Messages are used to provide valuable information to users. This section can be hidden by selecting the 'Hide' hyperlink.



The 'Recent Work' section displays up to 16 pieces of the most recent Access work initiated or saved by the user within the last 30 days. There is a 'Filter By' button which will hide any approved/finalized work so that only the pending access reports will display in the Recent work carousel. This section can also be hidden by selecting the 'Hide' hyperlink, this is a preference that will stay when the user logs out and logs back in.



In the Upcoming and overdue tasks section there are many filters:

A: Can be viewed either by task list (next 10 days, next 6 months, next year) or by calendar.
B: Under the County view users can view My workers or All [Agency] workers (if they have the appropriate security). In the example above the user is a State worker who has supervisory security.
C: Supervisors can see one worker, several different workers, or all of the workers assigned to them with the Worker view dropdown.
D: Supervisors can also decide to include, exclude, or view only escalated ticklers.
E: To manually create a task, click the Create task hyperlink. Supervisors can also create tasks for workers.
F: Clicking the Tickler management hyperlink will open the tickler management page. This link is only available to those with the proper security.
G: Clicking on the Worker statistics hyperlink will open the dashboards page.
H: The search box allows users to search for any tasks displayed on the tasks table. The data entered will be searched within any field in the tasks table.

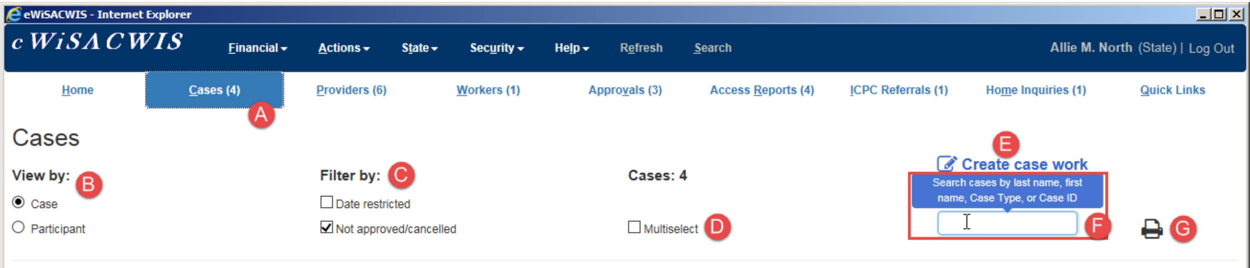
The task table lists all of the upcoming and overdue tasks in chronological order with the most recently due/overdue task. You can sort this table by clicking on any of the headers.

Showing 1 to 7 of 7 rows 10 rows per page

Date Due	Due In	Case/Provider Name	Participant(s) Name	Task Name	Responsible Worker	Shared With	Action
07/01/2017	-130	Payments, csltest x. IV (70000050)	Payments, csltest x., IV (70000442)	30 Day Photograph	Worker, Test	North, Allie M.; Ross, Jodi; Schaefer, Emily	
10/15/2017	-24	N/A	N/A	Manual Task - test	North, Allie M.	-	
10/22/2017	-17	Test, Grandma (70000054)	Test, Grandma (70000443); Test, Grandson (70000444)	Manual Task - test	North, Allie M.	-	
11/08/2017	0	Test, Grandma (70000054)	N/A	Initial Face-to-Face	North, Allie M.	-	
11/08/2017	0	Test, Jamie (70000055)	N/A	IA Due	North, Allie M.	-	
11/10/2017	2	Test, Grandma (70000054)	N/A	Initial Face-to-Face	North, Allie M.	-	
11/15/2017	7	N/A	N/A	Manual Task - test	North, Allie M.	-	

Due Date: The date the task is due.
Due In: The # of days in which the task is due or overdue.
Case/Provider Name: The case or provider's name.
Participant(s) Name: Identifies which participant(s) the task is associated with.
Task Name: Identifes what the task is and clicking on the blue text will launch the piece of work when we are able to identify it. If we are not able to identify the piece of work we will direct you towards the Create case work or Create provider work pages.
Responsible Worker: Identifies which worker is responsible to complete the task.
Shared With: Identifies who the task is shared with.
Action: Clicking on the icon will launch the task details page. Also, supervisors will see a blue trashcan icon that will display for any task that can be manually deleted, these can be directly deleted from the home tab.

Cases Tab



A: On the Cases tab, the number references the number of cases assigned to that user.

B: You can view the cases by Case or by Participant. For many of the selections made on the desktop they will remain as they were when the user logs out. Therefore if you select Participant view and logout, the next time you log in it will remain in Participant view.

C: You can also filter by Date restricted and/or Not approved/canceled. If you select Date restricted the information will be restricted based on the timeframes specified here: https://dcf.wisconsin.gov/knowledgeweb/training/ewisacwis-user-guides/general-functionality

D: The multiselect option allows the user to select more than one item underneath a case to display the information (i.e. payments and placements will both expand and be displayed).

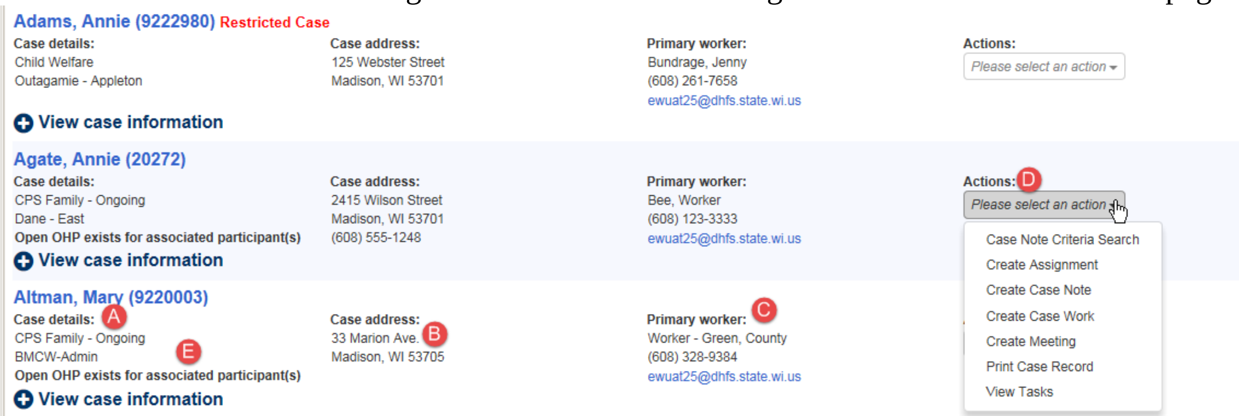
E: The Create case work hyperlink opens the Create casework page.

F: The Search box allows the user to search through the cases on their desktop based on the criteria entered in this field. Hovering over the search box will give the details of what is allowed to be searched: Search cases by last name, first name, case type or case ID.

G: When the print button is selected it will print all of your cases regardless of if they are loaded. When the desktop is initially opened, the Cases tab loads the first 10 cases assigned to that user, if the page is not scrolled down past those 10 cases, only those 10 cases will be printed. The case refresh button allows you to update your list of cases without refreshing the whole desktop. Note that this will not update any of the work information below the provider.

Note: The radio buttons or checkboxes associated with items B – D above are preferences. So the way they are selected when a user logs out is the way they will be selected when that user logs back in.

Within the cases section clicking on the case name will bring the user to the Maintain case page.



A: Case details: this section identifies the type of case, the case that is identified on the Maintain case page. ‘Open OHP exists for associated participant(s)’ will display if a child in the case has an out of home placement, though possibly not through the case this is displayed on.

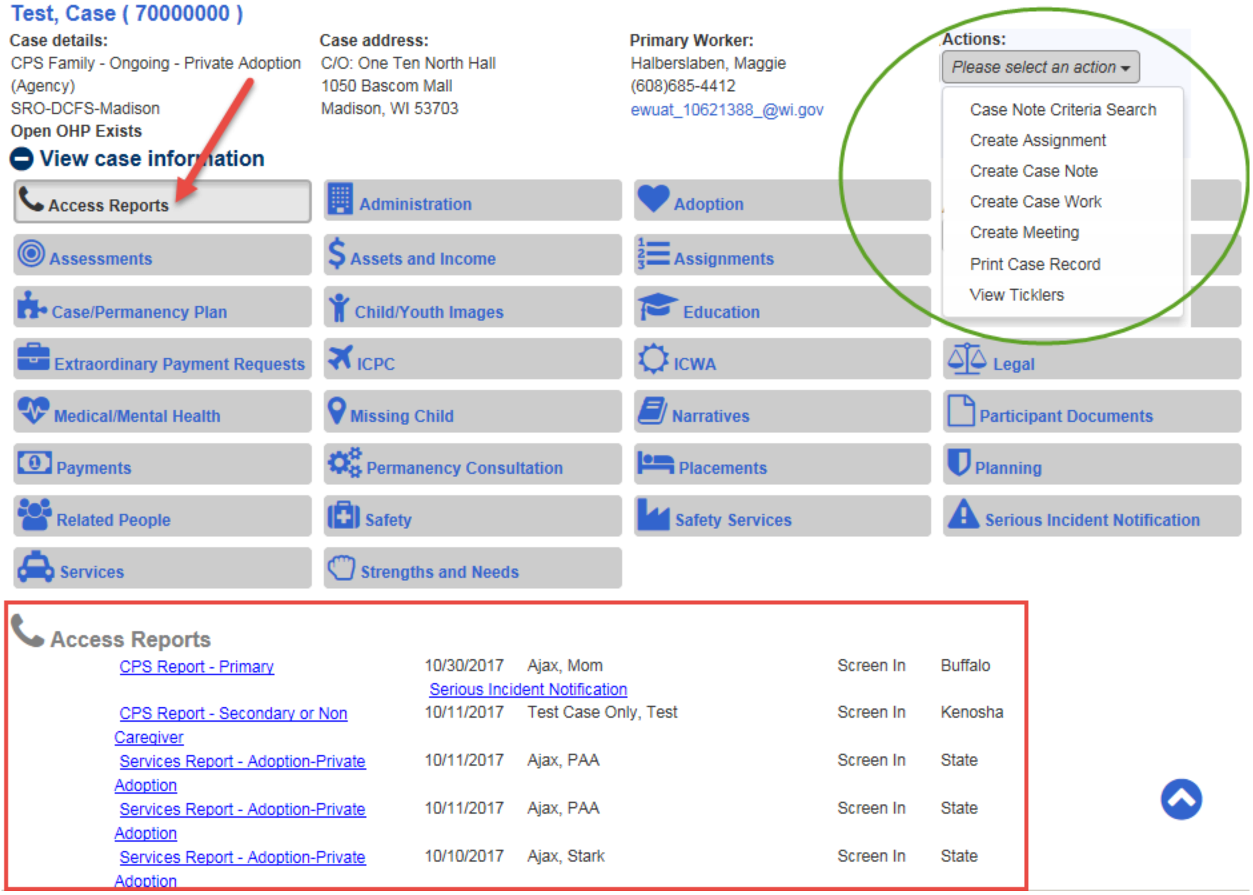
B: Case address: the address associated as the primary address on the Maintain case page.

C: Primary worker: information from the Maintain worker page for the individual assigned as the primary worker to the case.

D: Actions: drop-down that allows the user to do a number of actions associated with the case, such as create case work, create case note, create assignment, etc.

E: Clicking on the ‘View case information’ icon will expand all of the categories associated with that particular case.

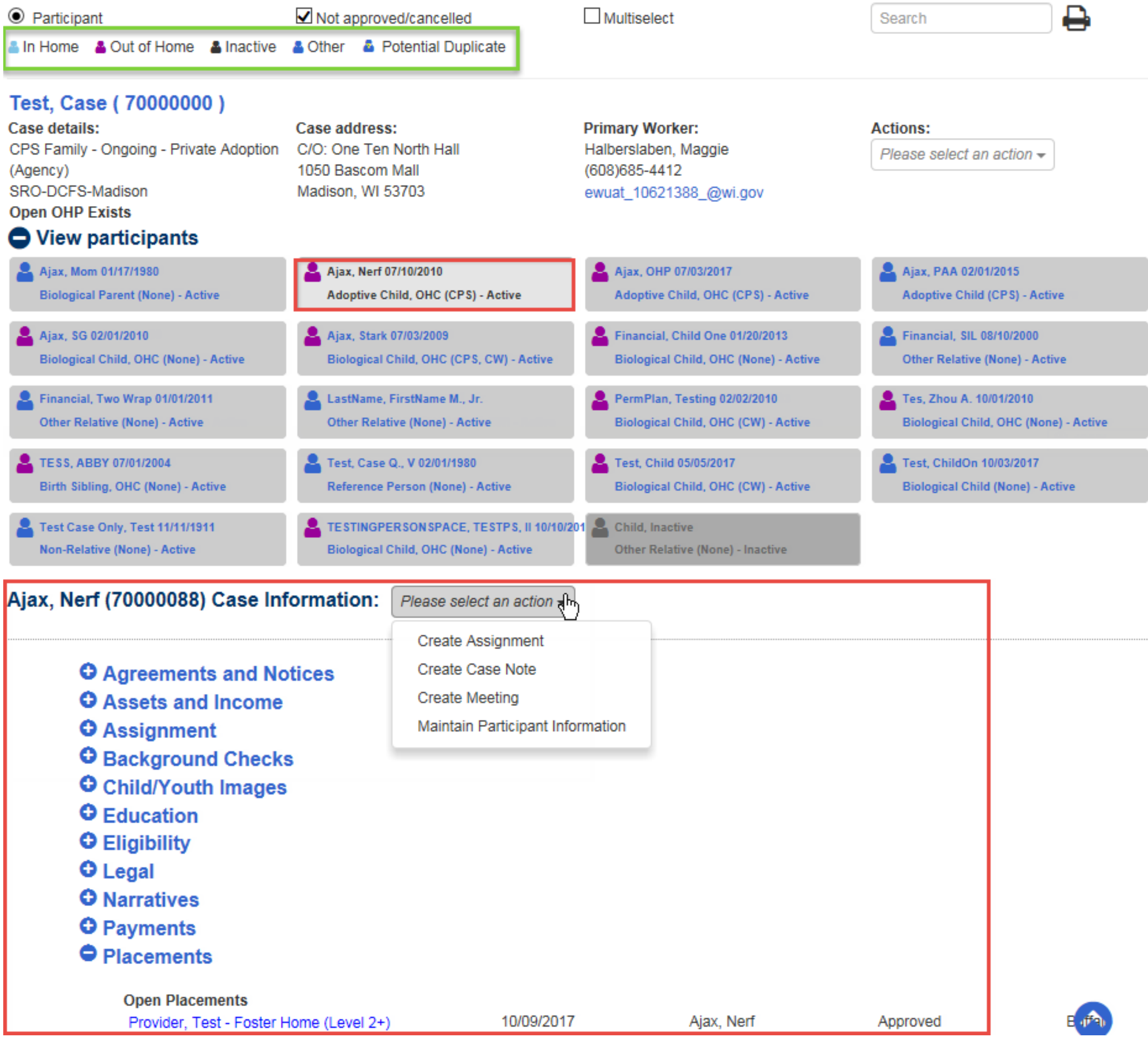
Cases Tab – Case view



Once the View case information is expanded you will see a series of buttons that categorize the work associated with the case or the participants of the case. Clicking on one of these buttons will expand the work. In the above screenshot we have clicked the ‘Access Reports’ button which shows the list of the access reports below.

When another category button is clicked, the Access reports will collapse and the other category will display. However if the ‘Multiselect’ checkbox is checked more than one category can be displayed at a time.

Cases Tab – Participant view

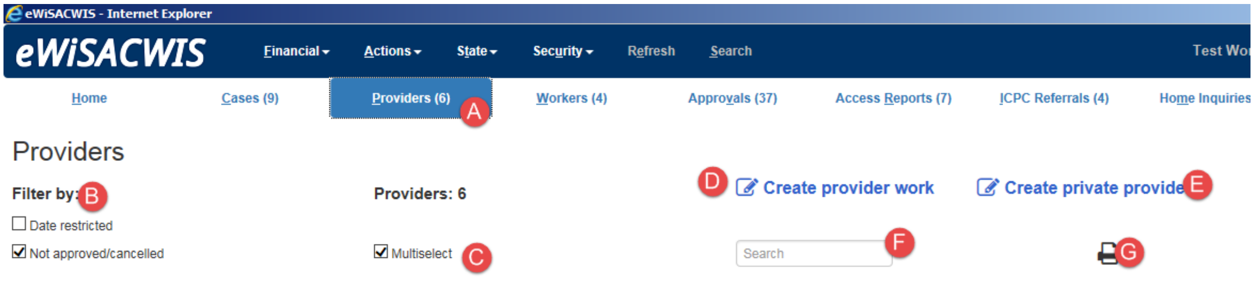


Once the View participants is expanded you will see a series of buttons that identify each participants that is associated to the case. Clicking on one of these buttons will display the icon for the case work associated with each participant. In the above screenshot we have clicked the 'Ajax, Nerf' button which shows the case work that is directly associated with that participant. Clicking on the plus sign next to the category of work will expand that particular information. In the above screenshot we have expanded 'Placements' to show the detail for this participant.

Also in participant mode if the Actions drop-down is selected next to the participants name the user will be able to more easily create work for that particular participant and maintain the participant information through the person management screen.

At the top of the participant view screen you will see descriptions of what each of the participant icon colors means as shown here:

Providers Tab



A: On the Providers tab, the number references the number of cases assigned to that user.

B: You can filter by Date restricted and/or Not approved/canceled. If you select Date restricted the information will be restricted based on the timeframes specified here: https://dcf.wisconsin.gov/knowledgeweb/training/ewisacwis-user-guides/general-functionality

C: The multiselect option allows the user to select more than one item underneath a provider to display the information (i.e. payments and placements will both expand and be displayed).

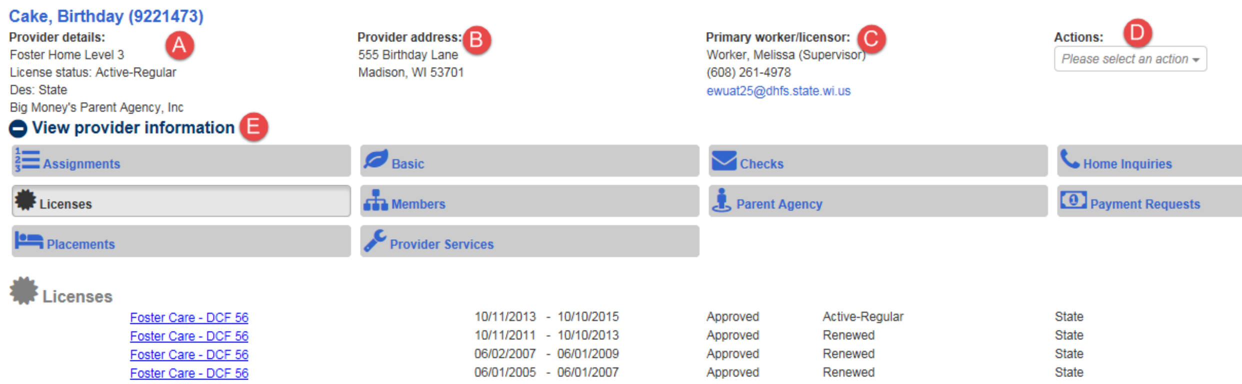
D: The Create provider work hyper link opens the Create Provider Work page.

E: The Create private provider work hyperlink opens the Private Provider page.

F: The Search box allows the user to search through the cases on their desktop based on the criteria entered in this field. Hovering over the search box will give the details of what is allowed to be searched: Search providers by last name, first name, provider type or provider ID.

G: When the print button is selected it will print the entire tab, regardless of if all of your providers have loaded yet. The provider refresh button allows you to update your list of providers without refreshing the whole desktop. Note that this will not update any of the work information below the provider.

Within the providers section clicking on the provider name will bring the user to the Home Provider or Private Provider page.



A: Provider details: this section identifies the type of provider, the license status, the designated county and the parent agency.

B: Provider address: the address associated as the primary address on the Home provider or Private Provider page.

C: Primary worker: information from the Maintain worker page for the individual assigned as the primary worker to the provider.

D: Actions: drop-down that allows the user to do a number of actions associated with the provider, such as create provider work, create provider note, create assignment, etc.

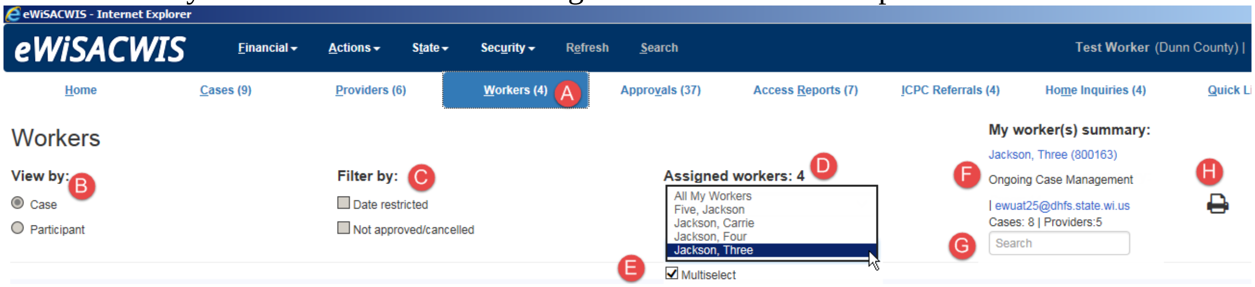
E: Clicking on the 'View provider information' icon will expand all of the categories associated with that particular case.

Once the View provider information is expanded you will see a series of buttons that categorize the work associated with the provider. Clicking on one of these buttons will expand the work. In the above screenshot we have clicked the 'Licenses' button which shows the list of the licenses below.

When another category button is clicked, the Licenses will collapse and the other category will display. However if the 'Multiselect' checkbox is checked more than one category can be displayed at a time.

Workers Tab

This tab is only visible to users who are assigned as another users supervisor in eWiSACWIS.



A: On the Workers tab, the number references the number of workers assigned to that user.

B: You can view this tab by either Case or Participant when a specific worker is selected.

C: You can filter by Date restricted and/or Not approved/canceled, when a specific worker is selected. If you select Date restricted the case/participant information will be restricted based on the timeframes specified here: https://dcf.wisconsin.gov/knowledgeweb/training/ewisacwis-user-guides/general-functionality.

D: The worker drop-down box defaults to 'All My Workers' being selected. The drop-down contains a list of the workers that the user supervises. If a specific worker is selected, their caseload information will display.

E: The multiselect option allows the user to select more than one item underneath a provider to display the information (i.e. payments and placements will both expand and be displayed).

F: These fields display only when an individual person is selected from the worker drop-down. This identifies their job class, email address, and the number of cases and providers the worker has assignments to.

G: The Search box allows the user to search through the selected worker's cases/providers and will limit the results displayed to those only those containing the search criteria. Hovering over the search box will give the details of what is allowed to be searched: Search providers by last name, first name, provider type or provider ID.

H: When the print button is selected it will print the entire tab.

Approvals Tab

A: On the Approvals tab, the number references the number of approvals assigned to that user (excluding the ones in progress).

B: You can view this tab by My approvals, Approvals in progress, or Approvals history.

<u>My approvals</u>: any approvals that the user has not yet sent for approval

<u>Approvals in progress</u>: any approvals that have been sent to the supervisor for approval but the approval has not yet been completed.

<u>Approvals history</u>: displays the approvals that have been completed within the last 72 hours.

C: Clicking on the Approval Management link will pop up the approval management page.

D: The Search box is used to search through the approvals table on the page and it will search any column of information.

E: The Refresh button refreshes the approvals table.

F: The Print button prints the approvals table.

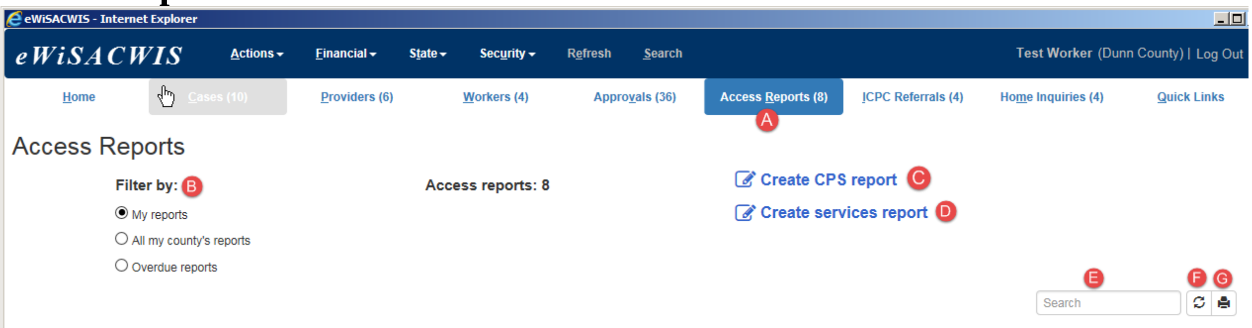
The approvals table lists all of the approvals that have not yet been sent for approval in chronological order with the most recently created task listed first. You can sort this table by clicking on any of the column headers. The page will automatically display 10 pending approvals, however this can be changed using the number of rows drop-down. Also, if there are more approvals than fit on one page, you will see the page selection on the top right of the table.

Showing 1 to 10 of 36 rows 10 rows per page ‹ 1 2 3 4 ›

Created	Case/Provider	Item	Participant	Worker	Approval Details
11/28/2017 04:53 PM	Sky, Big (9224540)	ASFA Exceptions	Sky, little	Worker, Test	Approval Details
11/28/2017 04:23 PM	Demo, Mom (9223260) Restricted Case	Present Danger Assess. & Protective Plan		Worker, Test	Approval Details
11/24/2017 09:44 AM	Demo, Mom (9223260) Restricted Case	Permanency Plan	Demo, Child	Worker, Test	Approval Details
11/24/2017 09:42 AM	Demo, Mom (9223260) Restricted Case	Permanency Plan Review/Hearing	Demo, Child	Worker, Test	Approval Details
11/22/2017 10:17 AM	Pumpkin, Mom (9224140)	Permanency Plan	Pumpkin, Kid Two	Worker, Test	Approval Details
11/22/2017 10:05 AM	Demo, Mom (9223260) Restricted Case	Permanency Plan	Demo, Child	Worker, Test	Approval Details
11/22/2017 10:02 AM	Demo, Mom (9223260) Restricted Case	Permanency Plan	Demo, Child	Worker, Test	Approval Details
11/22/2017 09:34 AM	Demo, Mom (9223260) Restricted Case	Permanency Plan	Demo, Child	Worker, Test	Approval Details
11/22/2017 08:00 AM	Demo, Mom (9223260) Restricted Case	Safety Assessment, Analysis and Plan		Worker, Test	Approval Details
11/21/2017 04:06 PM	Demo, Mom (9223260) Restricted Case	Confirming Safe Environments	Demo, ICWA II	Worker, Test	Approval Details

Created: The date the piece of work was created.
Case/Provider: The case name or provider name and ID that the piece of work was created under.
Item: The name of the piece of work. Clicking on the name will launch that piece of work so that it can be completed/sent for approval.
Participant: The name of the participant associated with the piece of work.
Worker: The name of the worker who created the piece of work.
Approval Details: The details of the approval. It will list any recalls, reroutes, etc. with the newest action listed on top.

Access Reports Tab



A: On the Access Reports tab, the number references the number of access reports that are pending.

B: You can filter this tab by My reports, All my county's reports, or Overdue reports.

<u>My reports</u>: displays all access reports that are not yet sent for approval

<u>All my county's reports</u>: access reports for all workers in a particular county

<u>Overdue reports</u>: displays the access reports that are overdue

C: Clicking on the Create CPS report link will pop up the CPS report page.

D: Clicking on the Create services report link will pop up the Services report page.

E: The Search box is used to search through the Access reports table on the page and it will search any column of information.

F: The Refresh button refreshes the access reports table.

G: The Print button prints the access reports table.

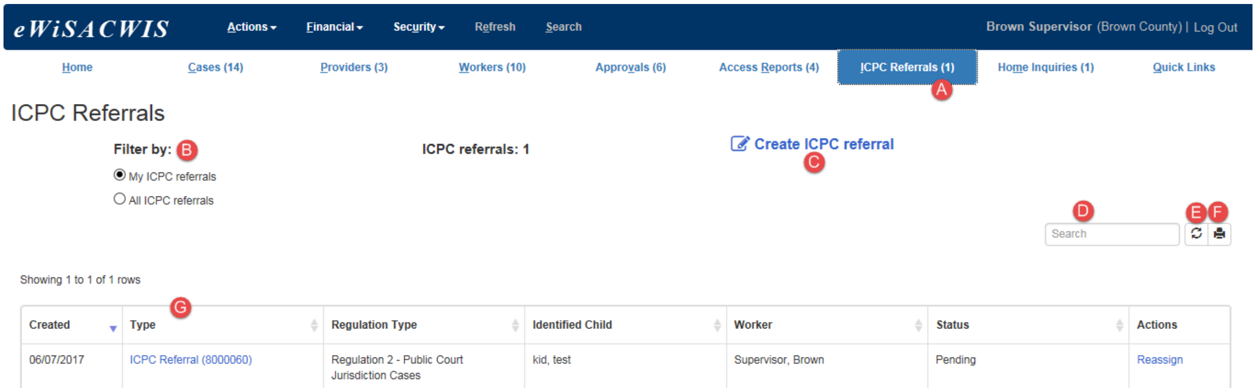
The access reports table lists all of the access reports that have not yet been sent for approval. You can sort this table by clicking on any of the column headers. The page will automatically display 10 pending access reports, however this can be changed using the number of rows drop-down. Also, if there are more approvals than fit on one page, you will see the page selection on the top right of the table.

Showing 1 to 8 of 8 rows 10 rows per page

Received	Response Time	Type	Report Name	Worker	Status	Actions
12/06/2017 08:30 AM	Same Day	CPS Report (9007962)	Closure, Afcars	Jackson, Three	Pending	Reassign
11/29/2017 08:00 AM		CPS Report (9008222)	Demo, Brother	Worker, Test	Pending	Reassign
11/11/2017 11:11 AM		Services Report (9008150)		Worker, Test	Pending	Reassign
11/11/2017 11:11 AM		Services Report (9008151)		Worker, Test	Pending	Reassign
11/11/2017 11:11 AM		Services Report (9008152)		Worker, Test	Pending	Reassign
11/11/2017 11:11 AM		Services Report (9008153)		Worker, Test	Pending	Reassign
10/01/2014 10:00 AM		Services Report (9006139)		Worker, Test	Pending	Reassign
04/14/2014 12:15 PM	Within 5 business days	CPS Report (9005879)	Rubble, Betty	Worker, Test	Screen In	Reassign

Received: The date the report was received.
Response Time: The response time as identified on the Decision tab of the report.
Type: The type of access report and the ID of that report.
Report Name: The name of the participant associated as the report name on the participants tab of the CPS/Services report.
Worker: The name of the worker who created the piece of work.
Status: The status of that access report.
Actions: The 'Reassign' hyperlink here to reassign an access report to another user.

ICPC Referrals Tab



A: On the ICPC Referrals tab, the number references the number of ICPC referrals that are pending.

B: You can filter this tab by My ICPC referrals or All ICPC referrals.
<u>My ICPC referrals</u>: displays all ICPC referrals that have not yet been sent for approval
<u>All ICPC referrals</u>: displays all ICPC referrals for that user's county that have not yet been sent for approval; this option is security driven

C: Clicking on the Create ICPC referral link will pop up the ICPC referral page.

D: The Search box is used to search through the ICPC referrals table on the page and it will search any column of information.

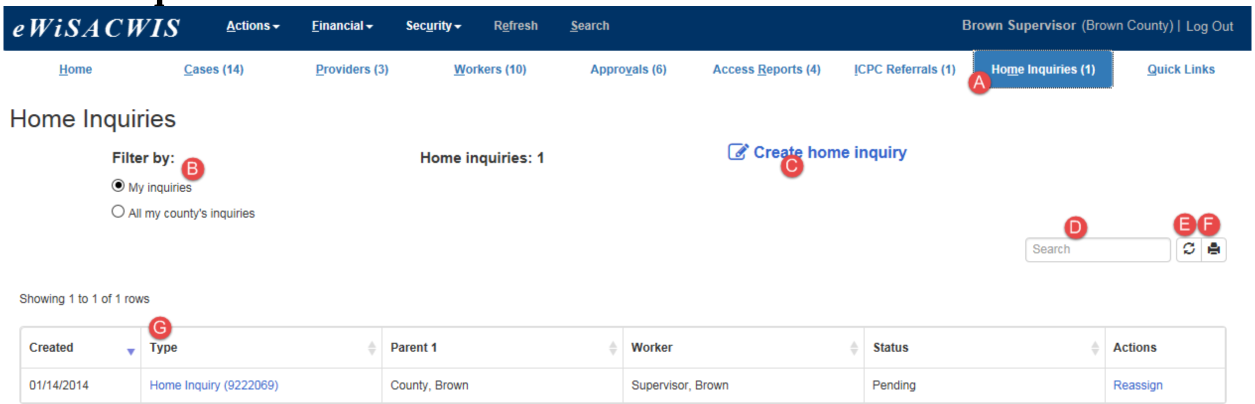
E: The Refresh button refreshes the ICPC referrals table.

F: The Print button prints the ICPC referrals table.

G: The ICPC referral table displays all ICPC referrals that have not yet been sent to the ICPC office for approval. This table will also display any referrals that have been sent back by the ICPC office for corrections. You can sort this table by clicking on any of the column headers. The page will automatically display 10 pending referrals, however this can be changed using the number of rows drop-down (if applicable). Also, if there are more referrals than fit on one page, you will see the page selection on the top right of the table.

Created: The date the referral was created.
Type: The type of referral and the referral ID.
Regulation Type: The regulation type that is associated with that referral.
Identified Child: The participant that is assigned the role of identified child.
Worker: The name of the worker who is assigned to the piece of work.
Status: The status of that ICPC referral.
Actions: The 'Reassign' hyperlink will reassign the referral to another user.

Home Inquiries Tab



A: On the Home Inquiries tab, the number references the number of home inquiries that are pending.

B: You can filter this tab by My ICPC inquiries or All my county's inquiries.

> My inquiries: displays all inquiries that have not yet been sent for approval
> All my county's inquiries: displays all ICPC referrals for that user's county that have not yet been approved; this option is security driven

C: Clicking on the Create home inquiry link will open the Home inquiry page.

D: The Search box is used to search through the Home inquiries table on the page and it will search any column of information.

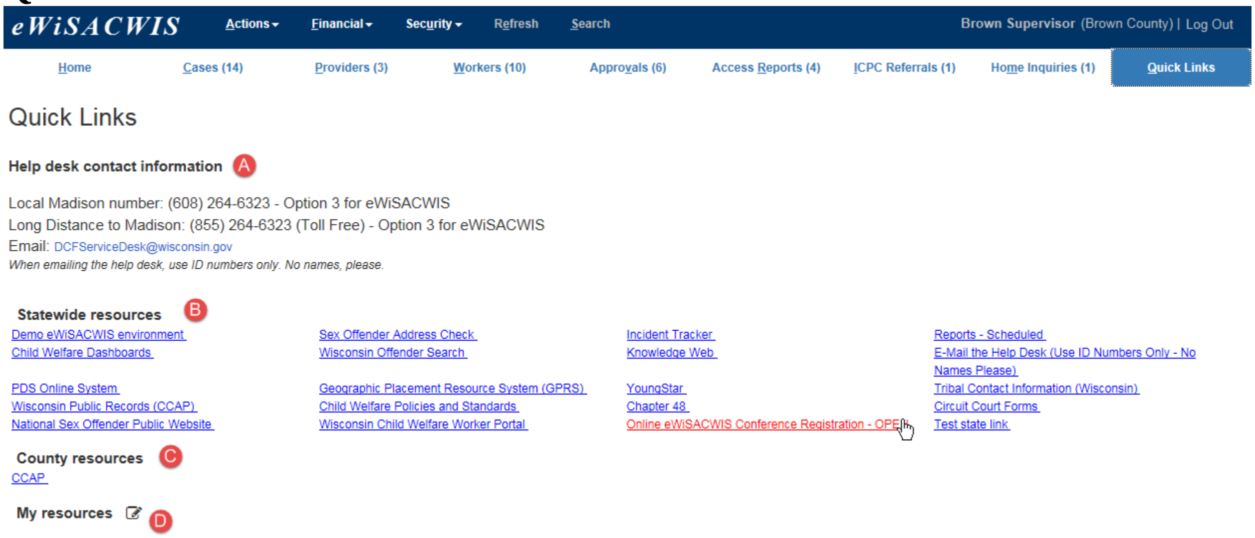
E: The Refresh button refreshes the Home inquiries table.

F: The Print button prints the Home inquiries table.

G: The Home inquiry table displays all Home inquiries that have not yet been sent for approval. You can sort this table by clicking on any of the column headers. The page will automatically display 10 pending referrals, however this can be changed using the number of rows drop-down (if applicable). Also, if there are more referrals than fit on one page, you will see the page selection on the top right of the table.

> **Created:** The date the inquiry was created.
> **Type:** The type of inquiry and the inquiry ID.
> **Parent 1:** The name of the individual associated as Parent 1.
> **Worker:** The name of the worker who created the piece of work.
> **Status:** The status of that inquiry.
> **Actions:** The 'Reassign' hyperlink will reassign the referral to another user.

Quick Links Tab



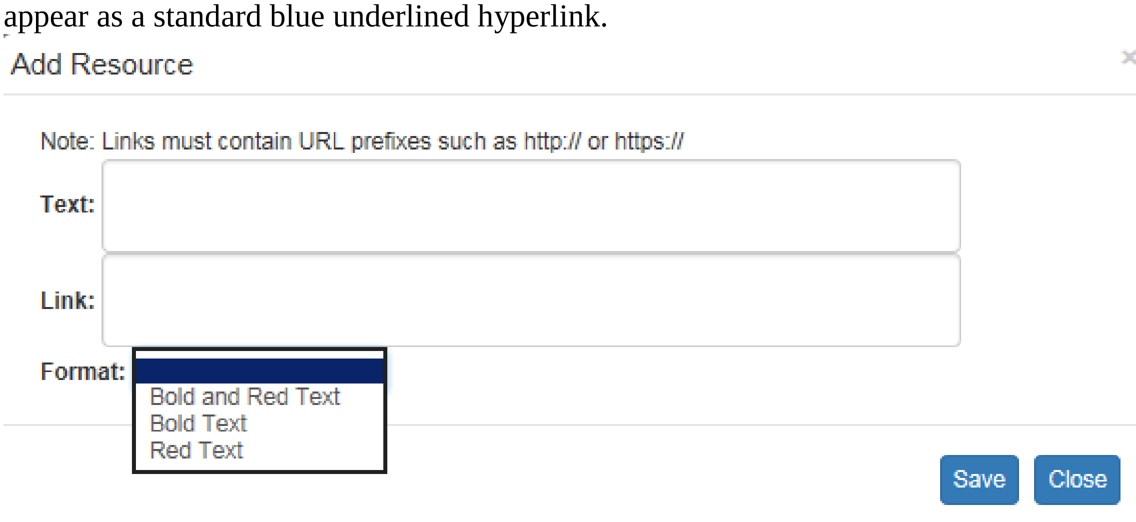
The quick links tab houses links and other useful information needed by many eWiSACWIS users.

A: Help desk contact information – the phone number and email information for the eWiSACWIS help desk; when calling/emailing in about specific eWiSACWIS concerns, be sure to note that in the subject line of an email and only use ID numbers.

B: Statewide resources – these are resources the the eWiSACWIS team includes as they are sites used by many users

C: County resources – these are resources that each county can enter for their specific county; only users with the proper security can add resources here

D: My resources – this section is for each user to enter their own commonly used resources; to enter a resource, click on the icon and then click on Add resource. In the box that appears, include the text of how you want it displayed, put in the Link for the website and you can also format it as shown below. If no formatting is selected, it will appear as a standard blue underlined hyperlink.

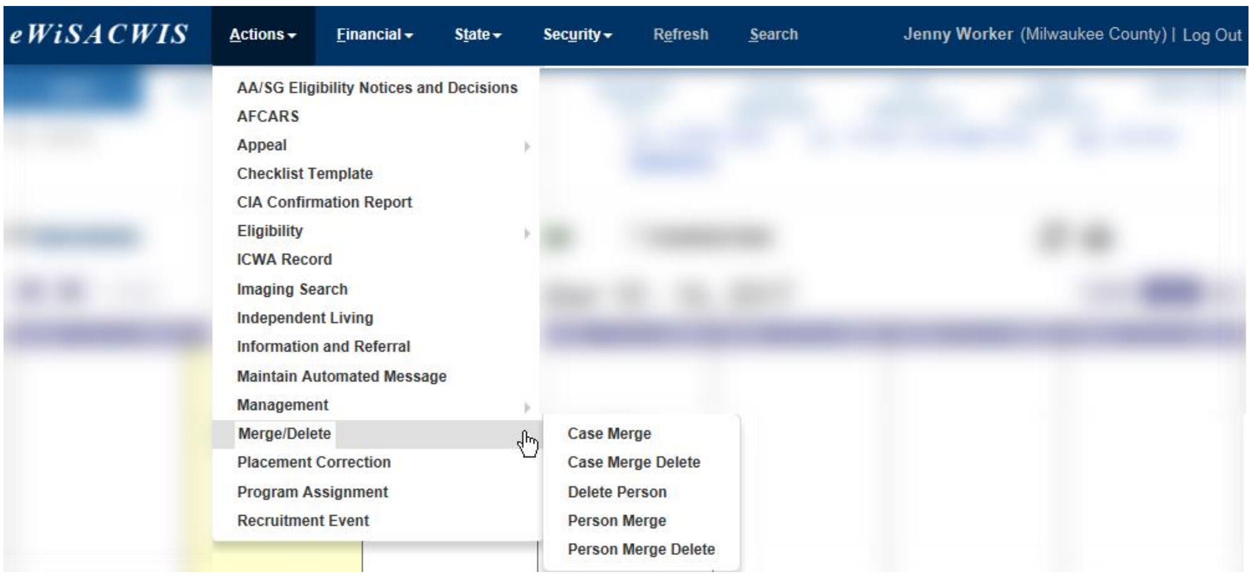


Menus

Menus are security driven and will only display the menus and items that a user has security to access. The screen below shows all of the available menus, however most users will not have all of the menus.

Actions Menu

The Actions menu is where most work will be completed. Most workers will not see this many options as they will only have the ability to see the items they have security for. Some items are under one category as they are related to one another, for example, Merge/Delete contains Case Merge, Case Merge Delete, Delete Person, Person Merge, and Person Merge Delete

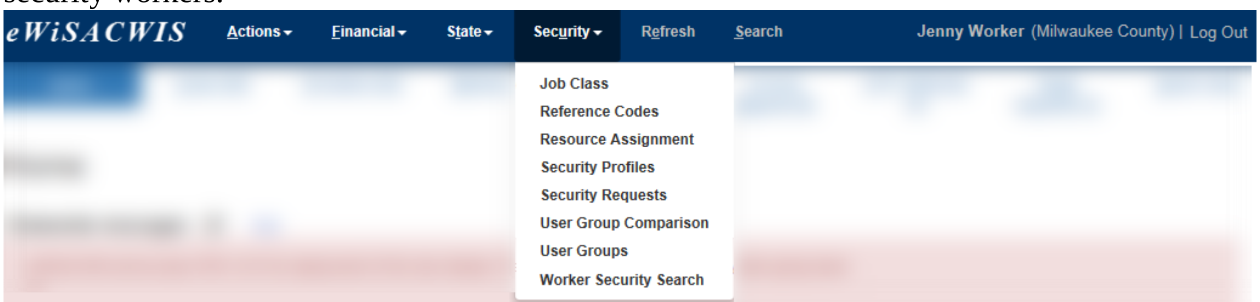


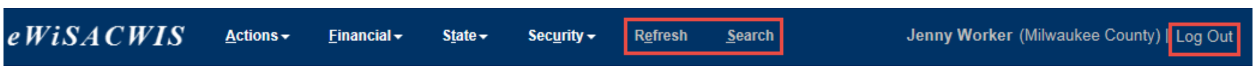
Financial Menu

The Financial menu is where financial workers would go to access and complete many of the financial pieces of work. This would only be seen if the user has security to see financials.

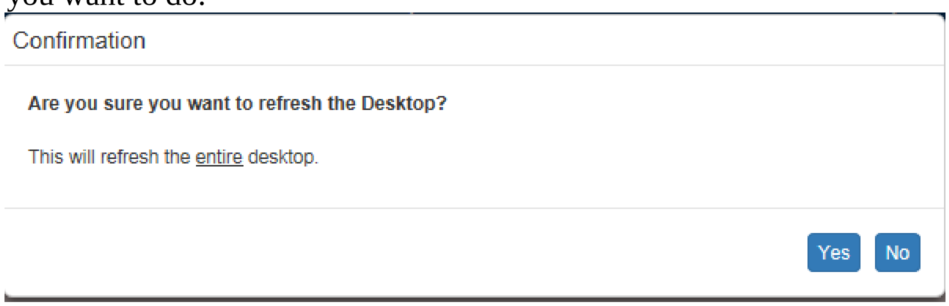
State Menu
This menu is only used by State level staff.

Security Menu
This menu is used by security delegates, but also can be seen by workers with the required security workers.





The Refresh link refreshes the entire desktop and will display a confirmation message asking if that is what you want to do:



The Search hyperlink opens up the Search page.

The log-out hyperlink is to log out of eWiSACWIS and this will also display a confirmation message when selected: